Acty	Category & Activity	2005				2006			
		Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
	Communications								
1	Recommend communications programs	■ Main	Ongoing	Ongoing	Ongoing	Ongoing	Ongoing	Ongoing	Ongoing
	Current State Assessments								
2	Conduct Spend Analysis		■ Main	■ Main					
3	Document current practice and processes		■ Main	■ Main					
4	Document roles between agencies		■ Main	■ Main	■ Main	■ Main			
	Transitions								
5	Recommend performance goals			■ Main					
6	Develop new processes			■ Main					
7	Recommend transition strategy			■ Main	■ Main				
	Performance-Based (PB) Partnering								
8	Recommend a PB strategy				■ Main	Ongoing	Ongoing	Ongoing	

KEY Main effort
Ongoing effort

Acty		a means now; b, later	
1	a	Conduct spend analysis and categorize	Provide input to a 3rd party spend analysis and categorize - e.g., funding source
2	b	Centralize process with clear roles / responsibilities	Document the processes with clear roles and responsibilities - by
3	a	Document practice and process by agency	Document current practice and process of the agencies
4	a	Establish management goals and reporting	Recommend management goals and reporting to the Customer Council
5	a	Establish communications programs with agencies	Recommend communications programs with agencies & DAS & ICN
6	b	Recommend a funding / acquisition model that supports: a) lifecycle sourcing; b) federal requirements;c) revolving funds	
7	8	Establish strategy for waiver process and grandfather transactions	
8	a	Review need for statutory and administrative rules changes	Establish a rule review process while developing new procedures, considering waiver processes and grandfathering
9	a	Identify structure and reporting requirements	Identify roles between agencies, a central IT procurement process, and other purchasing groups
10	a	Determine how to establish the function and the sequence by which each agency transitions into the function	Recommend a strategy by which each agency transitions into the function, considering waivers and grandfathering

NOTE THAT THESE ACTIVITIES WERE TRANSCRIBED TO THE ACTIVITY TEMPLATE; THIS SPREADSHEET - as an artifact - DOES NOT REPRESENT THE WORDING OF THE ACTIVITIES WHICH WERE DOCUMENTED

Acty a means now; b, later

11	a	Map roles and responsibilities for all Purchasing functions and identify the number of people associated with this function	Map roles and responsibilities for all Purchasing functions and identify the number of people associated with this function
12	a	Develop and manage resource plan to accomplish the transition and ongoing functions	
13	a	Notify suppliers of Iowa's intent to centralize and establish plan to receive invoices centrally	**Recommend communications programs with Iowa's suppliers**
100	a	Locate / centralize all contracts	
101	b	Inventory license and maintenance agreements – find the assets	
102	b	Identify redundant suppliers	
103	b	Establish long-term spend forecasts	
104	b	look for opportunities to consolidate contracts	
105	b	Standardize selection methodology	
106	b	Automate (e-Procurement) with reverse auctions, product catalogues, p-cards, etc.	
107	b	Standardize the acquisition request process	
108	b	Create a process which doesn't hinder worker productivity	

Acty   a means now; b, later

109 b research industry performance
measurement standards

110 b Establish process for local governments
to utilize vendor contracts

111 b reduce steps in procurement approval
process

112 b establish IT procurement template

113 b Don't reinvent the wheel; utilize existing
policies, rules, etc. w/ revising to meet
centralized sourcing requirements

114 b Similar rules for various purchasing
authorities

115 b establish best practices for procurement
and communicate

116 b Provide flexibility to agencies' program /
policy needs

117 b Ensure commitment of agencies do not
exceed their budgetary constraints

118 b Categorize procurement needs based
on department needs

119 b review other state processes to   x
evaluate success and best practice

120 b Long term procurement planning   x

121 b Keep up with technology   x

Acty   a means now; b, later

122   b   Create master agreements with suppliers

123   b   Renegotiate divisional contracts to statewide deals

124   b   Negotiate / amend cotermination dates for contracts with same vendor

125   b   Analyze contracts that are under-utilized (Cost more than benefit) for possible replacement

126   b   Create on-line contract database with performance

127   b   Establish IT contracts for various levels of functionality

128   b   Customize I-3 to track and automate procurement vendors

129   b   Analyze contracts for SLA's

130   b   Identify common performance requirements by contract types

131   b   Establish SLA measurement and reporting

132   b   Identify top 30 suppliers (volume)

133   b   Review supplier performance

134   b   Solicit supplier suggestions

Acty   a means now; b, later

135   b   Analyze top suppliers' performance and ROI

136   b   Reward vendors providing execptional / consistent performance

137   b   Inventory current suppliers to evaluate options for transition to standards

138   b   Life standards and life cycles tied to procurement

139   b   Consider open competition

140   b   review centrally coordinated procurement process for compliance with federal, state, and local funding requirements

200   9   Life cycle redistribution of equipment based on funding

201   9   Analyze business needs to determine if standards meet requirements

202   9   Offers

Procurement Team Workshops

Acty		Spend	Practices	Govern	Sourcing Strategy	Selection	Negotiate	Deal Measure	Supplier Mgmt	Lifecycle & asset
1	Conduct spend analysis	x								
2	Categorize spending	x								
3	Identify redundant suppliers	x								
4	Document practice and process by agency		x							
5	Standardize selection methodology		x							
6	Locate / centralize all contracts							x		
7	Analyze contracts for SLA's							x		
8	Establish SLA measurement and reporting							x		
9	Inventory license and maintenance agreements – find the assets							x		
10	Establish management goals and reporting			x						
11	Establish communications programs with agencies			x						
12	Establish funding models			x						
13	Centralize process with clear roles / responsibilities		x							

Acty		Spend	Practices	Govern	Sourcing Strategy	Selection	Negotiate	Deal Measure	Supplier Mgmt	Lifecycle & asset
14	Automate (e-Procurement) with reverse auctions, product catalogues, p-cards, etc.		x							
15	Identify top 30 suppliers (volume)								x	
16	Review supplier performance								x	
17	Solicit supplier suggestions								x	
18	Create master agreements with suppliers						x			
19	Renegotiate divisional contracts to statewide deals						x			
20	Establish long-term spend forecasts	x								
21	recognize funding / auditing requirements imposed by Federal gov't			x						
22	Recommend a funding / acquisition model that supports lifecycle sourcing			x						
23	review centrally coordinated procurement process for compliance with federal, state, and local funding requirements									
24	Revolving fund acquisitions			x						
25	Do not establish funding models			x						
26	Standardize the acquisition request process		x							
27	Create a process which doesn't hinder worker productivity		x							

Acty		Spend	Practices	Govern	Sourcing Strategy	Selection	Negotiate	Deal Measure	Supplier Mgmt	Lifecycle & asset
28	review other state processes to evaluate success and best practice		x							
29	establish best practices for procurement and communicate		x							
30	research industry performance measurement standards		x							
31	Provide flexibility to agencies' program / policy needs			x						
32	Ensure commitment of agencies do not exceed their budgetary constraints			x						
33	Negotiate / amend cotermination dates for contracts with same vendor						x			
34	Identify common performance requirements by contract types							x		
35	look for opportunities to consolidate contracts	x								
36	Establish process for local governments to utilize vendor contracts		x							
37	Establish strategy for waiver process and grandfather transactions			x						
38	Review need for statutory changes			x						
39	review administrative rules to determine needs for revision			x						
40	review need for administrative rule changes			x						
41	Don't reinvent the wheel; utilize existing policies, rules, etc. w/ revising to meet centralized sourcing requirements		x							
42	Similar rules for various purchasing authorities		x							

Acty		Spend	Practices	Govern	Sourcing Strategy	Selection	Negotiate	Deal Measure	Supplier Mgmt	Lifecycle & asset
43	reduce steps in procurement approval process		x							
44	establish IT procurement template									
45	Consider open competition									
46	Offers	go to Funding								
47	Long term procurement planning	x								
48	Categorize procurement needs based on department needs									
49	Keep up with technology									
50	develop a work plan to accomplish the tasks (new and existing) with the available resources									
51	Coordinate purchasing									
52	Life standards and life cycles tied to procurement									x
53										
54	Analyze business needs to determine if standards meet requirements	(is this governance?)								
55	Life cycle redistribution of equipment based on funding	(is this desktop?)								
56	Analyze contracts that are under-utilized (Cost more than benefit) for possible replacement									

Acty		Spend	Practices	Govern	Sourcing Strategy	Selection	Negotiate	Deal Measure	Supplier Mgmt	Lifecycle & asset
57	Analyze top suppliers' performance and ROI									
58	Create on-line contract database with performance									
59	Indentify structure and reporting requirements			x						
60	Establish IT contracts for various levels of functionality									
61	Reward vendors providing execptional / consistent performance									
62	Inventory current suppliers to evaluate options for transition to standards									
63	Customize I-3 to track and automate procurement vendors									
	Determine how to establish the function and the seque nce by which each agency comes into the fold									
	Map roles and responsibilities for all Purchasing functions and identify the number of people associated with this									